

Against the Grain

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People Profile: Toni Tracy

Editor

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Publisher Findings

Between September 2007 and February 2008, six scholarly publishers (three commercial and three not-for-profits) and three commercial eBook aggregators were interviewed and asked about various aspects of their eBook publishing and distribution activities. The aim was to discover how these organizations defined eBooks and the role they envision eBooks playing in their current and future programs. There was also an interest in understanding their business models for eBooks, what percentage of their sales were represented by eBooks, and what they estimated eBook sales growth would be over the next five years. The interview also explored their level of concern for the preservation of eBook content, any preservation strategies they currently had in place for this content, and what role they thought a trusted third party might play in eBook preservation.

- **eBook Definition:** There was general consensus that eBooks include e-only monographs, monographs appearing both in print and online, digitized print titles, and continuously updated reference databases. All of the participating publishers agreed that audio books are not currently included in the genre.
- **Role of eBooks:** 50% of the publishers interviewed agree that eBooks will eventually replace print in their publishing program while the other half view eBooks as experimental in nature as well as supplemental to a print publishing program that will endure.
- **eBook Sales/Business Models:** Participating publishers reported eBook sales of less than 1% of their total revenue to up to 100% of total sales for eBook-only publishers. All publishers expect double digit growth rates in eBook sales over the next five years.
- **Emerging Business Models:** Standard business models for eBooks have yet to emerge and the participating publishers currently employ a variety of channels and models including subscription, outright purchase with local loading rights, and exclusive as well as non-exclusive use of eBook aggregators. This is reminiscent of the early days of e-journals, and it is expected that as programs grow and revenues become more significant, standard eBook business models will emerge.
- **Preservation Concerns/Solutions:** All publishers are concerned about long-term preservation of eBooks and agree that the topic will gain importance as revenue from eBooks grows, but at the time of the study, no publisher had a preservation solution in place for their eBooks.



Toni Tracy

BORN AND LIVED: Born, New Brunswick, New Jersey. Have lived in New Jersey and Baltimore.

EARLY LIFE: Spent in New Jersey.

PROFESSIONAL CAREER AND ACTIVITIES: 25 years in medical publishing, first with **Williams & Wilkins** (now **Wolters Kluwer Health**) and then with **Churchill Livingstone** (now part of **Elsevier**) followed by early eBook development with **Franklin Electronic Publishers**.

IN MY SPARE TIME I LIKE TO: Travel, play golf.

HOW/WHERE DO I SEE THE INDUSTRY IN FIVE YEARS: I think that e-content formats will increasingly converge with less distinction made on the part of users whether the information they are accessing and using is a journal or a book or a database. This convergence will present new challenges for everyone in the scholarly publishing ecosystem. 🐼

- **Role of Portico in eBook Preservation:** All of the publishers interviewed expressed a desire for **Portico** to undertake eBook preservation in very much the same way as it has approached e-journal preservation, including “trigger event” access to content preserved in the archive.

Library Findings

During the same timeframe, eleven libraries and one consortium were interviewed and asked about trends in eBook adoption, usage and preservation. The aim here was to discover how these organizations defined eBooks and whether they saw eBooks moving into the mainstream of collections, much as e-journals did more than a decade ago. We were also interested in their definition of eBooks, trends in collection development and usage, concerns about preservation, and what role, if any, they felt **Portico** should play.

- **eBook Definition:** As with publishers there was general consensus that eBooks include e-only monographs, monographs appearing both in print and online, digitized print titles (including objects digitized by the library), and continuously updated reference databases. All those interviewed agreed that audio books were outside their collection scope although technically eBooks.

- **Trends in Collection Development:** With a few notable exceptions libraries regard eBooks as still

experimental content, but they express a strong expectation that over time (1-10 years) eBooks will become a core element of their collections much as e-journals have. One library reported an “aggressive” preference for eBooks and indicated that in selected disciplines only eBooks are purchased; print is no longer selected. Another library reported e-textbooks as an important component of ongoing eBook purchases.

“With a few notable exceptions libraries regard eBooks as still experimental content ...”

- **Discovery and Trends in Usage:** Most libraries reported minimal usage but expected usage to grow significantly over the next one- to two-year period. Two libraries reported very limited experimentation with handheld readers and did not expect to expand these activities. Several libraries reported that usage and requests for eBooks were subject to sudden spikes and that the source of these was difficult to identify. Usage across disciplines was highly varied and, as might be expected, was greatest in the sciences. Most libraries reported that users relied upon **Google** to discover eBooks; typically records for eBooks are loaded into the **OPAC**.
- **Business Models:** Typically libraries license large aggregated packages with ownership preferred, if possible. Post-cancellation access is typically available,

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